
Utilization Management and Discharge Planning Worklists are available to Care Management to assist the Care Manager in managing their daily tasks.

Worklist Filters

Within the UM Worklist or Discharge Planning Worklist, click the filter button to display filter options.



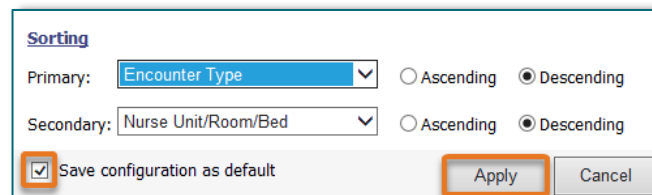
- Filters are used to pull in the correct patients to the worklist.
 - **Encounter Type, FIN Class, and Payer** do not need to be modified unless the Care Manager is only working with a specific payer or insurance type.
 - **Relationship** - from the drop down, select the desired relationship status to be pulled in.
 - **All** – patients who do not have a relationship with a Care Manager, patients with a relationship with other Care Managers, and patients that you have a relationship with, will display on the list.
 - **All** is the recommended filter.
 - **Next Clinical Review – (UM Worklist)**
 - From the drop down, select the timeframe in which the next clinical review is due for the patient to display.
 - **All Future Clinical Reviews** is the recommended filter.
 - If the Care Manager only wants to see those patients who are due to have a Clinical Review completed today, **Up to Today** would be selected.
 - **Next Assessment – (Discharge Planning Worklist)**
 - From the drop down, select the timeframe in which the Discharge Plan is due.
 - **All Future Assessments** is the recommended filter to select.
 - **Include patients with:**
 - **Closed UM reviews – (UM Worklist):** Check this box if patients who have a closed UM review are wanted on the worklist. If left unchecked, once a UM review is closed, the patient will automatically be removed from the worklist.
 - **No Next Clinical Review – (UM Worklist):** Check this box to populate patients who do not have a Clinical Review scheduled on the worklist.
 - **Completed discharge plan status – (Discharge Planning Worklist):** Check this box to keep patients who have a completed discharge plan on the worklist.
 - **Not Needed Status- (Discharge Planning Worklist):** Check this box to keep patients who do not need Care Management involvement on the worklist.

- **No Next Assessment – (Discharge Planning Worklist):** Check this box so patients without a next assessment due date documented will appear on the worklist.
- **Discharge or Consult Orders with no assigned relationship – (Discharge Planning Worklist):** Check this box so patients with a Discharge Order (DX) who have not had Care Management involvement populate on the worklist.

➤ Sorting

- Sorting is an individual workflow decision by Care Managers.
 - **Primary** – from the drop down, select how the list should be sorted.
 - It may be helpful to sort by **Encounter type**, so **Observation** patients appear at the top of the list.
 - **Secondary** – after the list is sorted by the primary selection, the list will be sorted by the secondary selection.
 - If several nursing units are being covered by one Care Manager, sorting by **Nurse/Unit/Room/Bed** may be helpful.
 - **Tertiary** – the **Discharge Planning Worklist** has a third option for sorting which may or may not be helpful.

NOTE: Save configuration as a default should always be checked before clicking Apply. Each time the Filter Settings are opened, the box will default unchecked. If the configurations are not saved as default, each time the worklist is opened, the filters will need to be reset.



Sorting

Primary: Encounter Type Ascending Descending

Secondary: Nurse Unit/Room/Bed Ascending Descending

Save configuration as default



- Click the wrench and green brush icon to modify **Patient Lists**.



Hover Functionality

- **Patient name – (UM Worklist):** Displays the patient Medical Record Number (MRN) and Date of Birth (DOB).
- **Patient name – (Discharge Planning Worklist):** Displays the patient MRN, DOB, and the Discharge Plan Status.
- **Group (DRG) number:** Displays the name for the DRG.
- **Next Clinical Review column – (UM Worklist):** Selecting the notepad that appears in the upper right corner to navigate to the **Clinical Review MPage**.
- **Next Assessment column – (Discharge Planning Worklist):** Select the notepad in the upper right corner to navigate to the **Discharge Planning MPage**.
- **Insurance:** Displays additional patient insurance information.



- **Red triangle:** Displays various alerts. 
- **Yellow Note:** Appears when hovering in the **Patient** column and stays in view when a Care Management note has been documented. 
 - If a note has been created, hover over the note to view the last two notes documented.
 - If more than two notes have been created, all the notes can be viewed in the **Care Management Notes** component in the MPages.

UM Worklist

The UM Worklist is used by the UM Nurse or the Care Manager who is performing Clinical Reviews (InterQual).

➤ **Location Column (also present on Discharge Planning Worklist)**

- Click the black carat next to the nursing unit name for additional information about the current and previous admissions.

➤ **Patient Column**

- **UM Status** displays under the patient age and gender.
- **Not Available** indicates that a UM Status has not been documented.
 - Click **Not Available** to add a UM Status.
- **UM Status** can be updated from the worklist or the Care Management MPage component.
 - Both locations are updated when documented from either location.

➤ **Visit Length Column**

- **LOS (length of stay)** – Displays in days and hours.
 - **Auth end** – Displays the number of authorized days remaining. If the hospital stay exceeds the Authorization date, the Auth end will turn red and begin counting how many days the patient has exceeded an authorized stay.
 - **PDD (predicted discharge date)** – Populated from the documentation of Anticipated Date of Discharge.
 - **eLOS (expected length of stay)** – Populated by the documentation of the DRG (Working Group).
 - If a patient has been readmitted within 30 days, **Readmission** will appear next to the date of admission in red.
 - Click **Readmission** to navigate to the **Readmission MPage** to document the readmission.
 - Once the readmission has been documented, readmission will turn grey.
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Discharge Planning Worklist

The Discharge Planning Worklist is used to manage Care Management consults and discharge planning.

➤ Patient Column

- **Discharge Plan Status:** Displays below the patients age and gender.
- **Not Available:** Indicates that a Discharge Plan Status has not been documented.
 - Click **Not Available** to add a Discharge Plan Status.
- **Discharge Plan Status:** Updated from the worklist or the Care Management MPage component.
 - Both locations are updated when documented from either location.

➤ FIN/Visit Reason

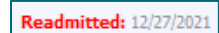
- The FIN, encounter type, medical service, attending physician, and primary care physician are listed.

➤ Group Column

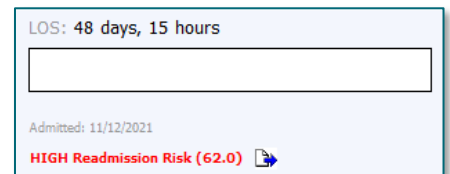
- Displays the DRG number, same as the UM Worklist.

➤ Visit Length

- LOS is displayed in days and hours.
- Admission date is shown. If the patient has been readmitted, the date will display in **red**.
- Readmission risk score is displayed as Low, Moderate, or High.
 - Click the link directly after the Risk Score to navigate to the patient's Readmission Risk Summary Page.




Readmitted: 12/27/2021



LOS: 48 days, 15 hours

Admitted: 11/12/2021

HIGH Readmission Risk (62.0) 

➤ Next Assessment Column

- The timeframe in which the discharge plan is due displays. If the plan becomes overdue, the timeframe will turn **red**.
- **Last Update:** A timeframe will populate when there is an update in naviHealth to prompt the Care Manager to open naviHealth.

➤ Payer Column

- Displays insurance/method of payment.
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Printing the UM Worklist or Discharge Planning Worklist

- Click the blue [Print](#) link below the **Minutes Ago** button to print the worklist.
- Only the most recently documented **Care Management Sticky Note** will appear on the printed worklist.